

Effective Date: 4/1/81
Last Revised: 10/09

Town of Concord

APP #29 Educational Assistance Policy

Introduction

Generally Town management will be very supportive of a department head's request on behalf of an employee for individual coursework that is clearly JOB-RELATED. The Town Manager will look more carefully at subsidizing full degree programs for single individuals in a given department. Town management is not opposed to supporting a degree, but the standard of benefit for the Town must be higher under those circumstances. The Town Manager reserves the right to make such a determination as well as to interrupt the financial assistance if, for instance, economic circumstances dictate.

Purpose

The purpose of the Educational Assistance Policy is to encourage self-improvement among employees and to benefit the Town through approved, semester-based, graded courses in accredited educational institutions of recognized standing. **Educational Assistance requires prior authorization of the Town Manager on a per-course basis and is subject to budgetary limitations.** There is a general eligibility limit of not more than one course per semester, and not more than two courses per year per employee (see Appendix A, part 1 for preauthorization requirement).

Eligibility

All regular status employees working at least 25 hours per week, who are in good standing, have been in continuous employment with the Town for at least one year, and are not covered by a collective bargaining agreement are eligible for educational assistance. The Town Manager may, at his/her discretion, require a contractual commitment prior to approving the refund. It is expected that an employee will not terminate his/her employment with the Town for at least two months following the Town Manager's approval of reimbursement. An employee acknowledgment form (Appendix A) shall be signed prior to any refund approval.

Course Requirements

The course(s) must be in an institution of higher learning or sponsored by a professional association approved by the department head and Town Manager, and must be related to either the employee's present job or be such as to support his/her

future growth and professional development as an employee of the Town. The department head and Town Manager will approve only the maximum number of credit hours or units that he/she feels the employee can carry without detriment to his/her job performance.

Performance Requirements

Assistance will be granted only when the employee has successfully completed the specified course(s) with a minimum grade of B- (or numerical equivalent) for a graduate/professional degree course and a minimum grade of C (or numerical equivalent) for a high school, undergraduate or continuing education course. In the case of a pass/fail course, a grade of "pass" must be obtained. Courses that do not issue grades require a certificate of completion.

Amount of Reimbursement

Upon presentation of bills, passing grade report, and proof of payment (i.e. credit card receipts, cancelled checks, etc.), the Town will reimburse for tuition, registration, laboratory, textbooks and other appropriate fees. Transportation costs will be borne by the employee. The amount of the reimbursement shall be agreed in writing and in advance, and shall be at the discretion of the Town Manager subject to budgetary limitations. Again, an individual will not ordinarily be eligible for reimbursement for more than one course per semester and not more than two courses per year. The Town Manager may grant release time from normal working hours, as (s)he deems appropriate.

Taxable Status

Since this policy's initial implementation in 1981, the taxable status of educational reimbursements has been subject to legislative instability at the Federal level. Therefore, rather than identify the current taxable status of educational reimbursement in this policy, department heads are to clarify employees' queries as they arise via communication with the Town Finance Department.

Method of Payment

Payment will be made through the payroll.

As mentioned in the preceding section, the taxable status of educational reimbursements may often be subject to change. Therefore each department anticipating an educational reimbursement should confirm with the Finance Department, as needed, that the current legal method of reimbursement is applied.

Approval

Prior to approval, the department head must submit the completed employee acknowledgment form (Appendix A, part 1) for Town Manager (or his/her designee) approval, documenting the amount of assistance to be paid, and certifying that all preliminary conditions of this APP have been met. A signed copy of the acknowledgment form signifying the Town Manager's approval will be returned to the

department head **and to the Finance Director**. This will signify that the employee may proceed with the course, require the department head to carefully review the employee's full compliance with the course requirements of this APP, and authorize the department head to make payment upon successful completion and submission of any relevant documentation. Copies of the fully executed authorization form will be attached to the payroll submission and submitted to the Finance Director for his/her records. The original, completed form will be forwarded to the Human Resources Department for the employee's personnel file.

Distribution: Department Heads
Committee and Board Chairs (for APP books)

APP #29
Appendix A

Part 1 (Completed prior to course enrollment):

Employee Acknowledgment

I have read APP #29 in its entirety. I understand the terms and conditions for Educational Assistance delineated in the policy, and I agree to abide by those terms and conditions in their entirety. Particularly, but not exclusively, I agree that I must meet each requirement relating to eligibility, course content, performance, reimbursement procedures, and course approval procedures. I understand that if I do not meet each of the requirements as specified, reimbursement will not be available and any prior approval will be rescinded. **For consideration, I attach a course description which includes details such as cost and associated fees, dates, content and credits.**

(Employee Name) (Employee Signature) (Date)

Department Head Acknowledgment

I certify that funds in the amount of _____ are available, and I approve of this reimbursement application subject to the terms of APP #29.

(Department Head Signature) (Date)

Town Manager Approval

Approval of this application signifies that the Town Manager is satisfied with the above acknowledgements that the application meets the preliminary requirements for reimbursement, and that the Town Manager authorizes the department head to approve final payment after the department head determines that all requirements of APP #29 are met by the employee.

(Town Manager Approval) (Date)

Part 2 (Completed prior to reimbursement)

Department Head Payment Authorization

I certify that the applicant has met all terms of APP #29 and authorize payment in the amount of _____.

(Department Head Signature) (Date)

Copy to: Payroll Submission
Human Resources
Finance Director